

# The Legacy You Want to Be Known For

## REFLECTIVE CHECKLIST & GUIDE

*A Return on Life® Wealth Partners Resource*

Legacy is not just about what you leave behind, but how your values, decisions, and priorities shape the story you tell over time. As you reflect on the story your money and your legacy may tell, use this checklist to help clarify what you want to be remembered for and how those priorities may be shared with future generations.

### 1. YOUR LEGACY MINDSET

Check all that apply:

*It's important that my legacy:*

- Gets to the heart of who I truly am and what I believe in, not just what I own
- Begins now through daily choices and meaningful actions
- Helps my family understand the values behind my financial decisions
- Passes down wisdom, gratitude, and perspective — not just assets
- Enables my wealth to create opportunities for others
- Ensures I am remembered more for my character than my net worth
- Other: \_\_\_\_\_

### 2. THE VALUES THAT DEFINE YOU

To help determine the foundation of your legacy, label your top 5 core values in order of importance with "1" being most important and "5" being the least important of the 5 values you select below:

- |                   |                     |
|-------------------|---------------------|
| ____ Family       | ____ Gratitude      |
| ____ Integrity    | ____ Kindness       |
| ____ Generosity   | ____ Perseverance   |
| ____ Faith        | ____ Adventure      |
| ____ Growth       | ____ Responsibility |
| ____ Education    | ____ Security       |
| ____ Hard Work    | ____ Love           |
| ____ Opportunity  |                     |
| ____ Service      |                     |
| ____ Other: _____ |                     |

**Reflection Prompt:** If your children or grandchildren observed only your financial decisions, what values might they say mattered most to you?

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### SECTION 3: UNWRITTEN STORIES — YOUR LIFE LESSONS

Is there a single story or life event that captures the heart of who you are? Check one:

- The biggest financial lesson I learned growing up
- The hardest challenge I ever overcame
- A moment that shaped my view of money
- A value I learned from my parents or grandparents
- A mistake that taught me something important
- The best piece of advice I ever received
- The moment when I realized what really matters
- Other: \_\_\_\_\_

*Reflection Prompt:* How did this pivotal event or experience impact your life?

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### SECTION 4: FAMILY CONNECTION

Which of the following goals are important to you? Check all that apply:

- Having open, informal money conversations rooted in purpose
- Sharing the “why” behind my decisions, not the numbers
- Asking my children what success and opportunity mean to them
- Creating a shared family mission statement
- Defining shared values, vision, and rules regarding the management of family wealth
- Listening to my family’s hopes, fears, and dreams for the future
- Beginning a tradition of annual discussions about values and goals
- Sharing stories—not spreadsheets—to build emotional trust
- Other: \_\_\_\_\_

*Reflection Prompt:* What does your family need to hear from you right now?

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### SECTION 5: BALANCING GIVING & INHERITANCE

Which of the following reflect your philanthropic goals and priorities? Check all that apply.

- Support for the organizations and causes that mirror my family’s values
- Ability for my children and/or grandchildren to experience the joy of giving with me
- Seamless integration of my philanthropic and inheritance goals
- Opportunity to teach stewardship and empathy through charitable giving
- Establish a family “Giving Day” or other charitable tradition
- Other: \_\_\_\_\_

*Reflection Prompt:* What impact do you want your giving to make for your family, community, or the organizations and causes you support?

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## SECTION 6: YOUR LIVING LEGACY

Witnessing your legacy in action during your lifetime may bring a greater sense of meaning and purpose.

Which of the following actions align with your legacy planning goals? Check all that apply:

- Mentoring younger people or rising professionals
- Supporting a child or grandchild's education or passions
- Giving time, talent, or resources to causes that move me
- Creating meaningful family experiences
- Sharing my wisdom, not just my resources
- Investing in people and opportunities that align with my purpose
- Building traditions that reflect who we are as a family
- Other: \_\_\_\_\_

*Reflection Prompt:* If you could begin one legacy action this month, what would it be?

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## SECTION 7: TRADITIONS THAT OUTLIVE YOU

Which tradition could become your family's most meaningful inheritance?

- Annual family meeting to discuss values, goals, and gratitude
- A "Founders' Day" to honor your family roots
- A family giving ritual or volunteering day
- A Legacy Journal updated each year
- Passing down meaningful stories with keepsakes
- Annual celebration of accomplishments and lessons learned
- A storytelling night to share history and wisdom
- Other: \_\_\_\_\_

*Reflection Prompt:* If you could begin one legacy tradition this year, what would it be?

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## SECTION 8: YOUR LEGACY STATEMENT

Complete the sentence below to define your legacy in one powerful paragraph:

*"I want to be remembered for..."*

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## SECTION 9: NEXT STEPS AND ONGOING CONVERSATIONS

How can we support ongoing conversations around the legacy you want to be known for? Check all that apply below, then contact us to talk about meaningful ways we can help you define and pursue your legacy goals.

*I would like assistance with:*

- Defining my family mission and values
- Clarifying my charitable giving strategy
- Thinking intentionally about a legacy that reflects both my heart and my finances
- Creating a plan for purposeful inheritance
- Facilitating family legacy conversations
- Building a living legacy I can enjoy today
- Considering how my financial decisions reflect the story I want to tell
- Other: \_\_\_\_\_



If you'd like to continue the conversation, we welcome the opportunity to discuss general planning considerations aligned with your goals. To schedule a convenient time to meet, contact us today at

**440.740.0130** or visit us at **ReturnOnLifeWealth.com**

**REAL PEOPLE. REAL ANSWERS.**

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